Producer Licensing Bureau - Education Section 300 Capitol Mall Sacramento, CA 95814 Information (916) 492-3064 www.insurance.ca.gov

				www.insurance.ca.gov			
Instructions:	16			Department Use Only:			
 This form must be completed for each course submitte A completed application with the proper attachments a 			Course #:				
received in the Department at least 30 days prior to the			_				
for that first course offering to be approved.Ethics, Annuity, Adjuster, Long-Term Care, Life Settler	emagunare'	Approval peri	od:				
 Ethics, Annuity, Adjuster, Long-Term Care, Life Settler course applications must include the specific required 			Credit Hours:	Category code:			
items (see page 2 and 3 of this application).							
				BI N. L. /			
First course presentation date:	Provider	Number:		Phone Number: ()			
Provider Name: Course Title*:							
Course ride .		If continuing edu	unation is this	course intended to meet any statutory			
Check one course type: Prelicensing Education Continuing Education		If continuing education, is this course intended to meet any statutory requirements? No Yes (if yes, indicate requirement below)					
Number of Declination Education house requested:		Californi	:- I and Torm (S O4 Hour Coro Coverage			
Number of Prelicensing Education hours requested:		☐ California Long-Term Care☐ California Partnership for Long-Term Care					
12-hour 20-hour 32-hour 40-hour 52-hou	ır	☐ Annuity	☐ Ho	meowners' Insurance Valuation			
Code and Ethics		☐ Ethics ☐ Life Sett	_	od			
Etnics			Jemeni.				
Instruction Method:							
Contact: Seminar	Non-C	_	DVD Corresponden	as/Tayt Dook			
☐ Workshop/Conference ☐ Classroom/Lecture		Correspondence/Text Book Internet					
Teleconference (monitored)							
Webinar (monitored)							
License Type(s)(check one): Property Casualty Property and Casualty Personal Lines							
☐ Limited Lines Automobile ☐ Life-Only ☐ Accident and Health ☐ Life-Only and Accident and Health							
☐ Life Settlement ☐ Public Adjuster ☐ Indepen	☐ Life Settlement ☐ Public Adjuster ☐ Independent Adjuster ☐ Independent and Public Adjuster						
Is this course part of a designation program? Yes No	If yes, wh	nich program?					
Number of course credit hours requested (Not	te: courses			list of courses open to public?			
must be at least one hour and partial hours will not be accepted):							
Certification: I certify under penalty of perjury that I have read and understand the information and requirements contained in this application, that all statements are true and nothing has been withheld which would influence a complete evaluation of this course.							
•							
Original Signature of Provider Director			Date				
Printed Name of Provider Director							
For Department use only: Course approved Course not approved Comments/Calculations:							
By:		Date					
Education Cocion Ctan		Date					

^{*}Advertising and course materials must use this exact title. Courses based on another provider's material must be approved by that provider and must use same name.

REQUIRED ATTACHMENT CHECKLIST:

A. Conta	ıct	Courses:				
		A detailed statement on how the course is relevant to insurance topics and insurance products.				
	1 2	A detailed outline of approximately one page per hour of instruction including the time each topic is being presented.				
	3	A copy of all materials presented to each student if a detailed outline is not submitted with application.				
	4	An agenda showing the beginning and ending times, breaks, and time allotted for exams, if applicable.				
	5 6	A completed Class Presentation Schedule form for each presentation. A current authorization letter from the author or publisher if using another vendor's source material as the basis for the course.				
	7	California prelicensing educational objectives with page and paragraph-references to the provider course material for every line				
		topic.				
	(For Pre	elicensing Courses Only)				
B.	Non-Co	entact Courses:				
	1	A detailed statement on how the course is relevant to insurance topics and insurance products.				
	2	DVD, text book for the course or copy of the text cover, copyright page and table of contents if using another vendor's pre- approved material/book.				
	3	Internet courses must include your Internet address, security measures, log-on and password for our review of course(s). Answers to exam questions must reference section and screen for answer source.				
	4	A final examination with three questions for each hour of credit and questions scrambled (not in chapter order).				
	5	Answers to all exam questions with page and paragraph referencing to the provider course material used.				
	6	A current authorization letter from the author or publisher if using another vendor's source material.				
	7	Copy of instruction sheet sent to students.				
	8 9.	A document listing the total word count (4,600 words for each hour of credit). California prelicensing educational objectives with page and paragraph-references to the provider course material every line topic.				
		elicensing Courses Only)				
C.	Ethics 1	Fraining Course (attach separate sheet with responses to each of the eight statements listed below):				
	1	Describe how this course contributes to an agent's understanding of his/her ethical responsibilities.				
	2	Point out where in the course examples of "good" licensee conduct are given, as well as examples of "bad" licensee conduct.				
	3	Explain how this course contributes to an agent's understanding of the complexities of ethical decision-making within the context of insurance transactions.				
	4	Describe where in the coursework an agent may find tools to help the agent identify, prevent, and resolve ethical dilemmas that				
	_	arise in the course of conducting insurance business.				
	5	Explain how the content of this course contributes to the producers understanding of proper vs. improper, honest vs. dishonest behavior.				
	6	Provide two samples of licensee conduct you will use in this course to contrast ethical with unethical behavior and details supporting the judgment of ethical or unethical behavior.				
	7	Explain how this course demonstrates to whom the licensee "owes" an ethical responsibility in this course and how this course will help the licensee understand his or her ethical responsibilities to such an entity.				
	8	Explain how this course helps the licensee distinguish between legal and ethical behavior and legal but unethical behavior.				
D. Annui	ity	Training Courses:				
	Eight-H	our Annuity Training Courses:				
	1	A copy of the California Department of Insurance Eight-Hour Annuity Training Outline with page and paragraph-references to the provider course material for every line topic.				
		re two alternatives to develop four-hour annuity training courses: 1) follow the Four-Hour Annuity Training Course Specific Topic s; or 2) develop four-hour courses based on suggested topics in the Four-Hour Training Course Development and Review Guidelines.				
	1) Four-Hour Annuity Training Courses Developed With a Course Specific Topic Outline:					
	1					
	2) Four-Hour Annuity Training Courses Developed With the Four-Hour Annuity Training Course Development and Review					
	Guidelines (attach separate sheet with responses to each of the four statements listed below):					
	1	Illustrate with examples how this course provides an enriched and more thorough education than the training in Section V or				
	2	Section IX from the "California Department of Insurance Eight-Hour Annuity Training Outline". Point out where in the course the examples of how annuity contract provisions impact the senior consumer (Section V, "How fixed,				
	- ·-	variable, and index annuity contract provisions affect consumers", from the California Department of Insurance Eight-Hour Annuity				
		Training Outline) OR where in the course there are examples of proper and improper annuity sales practices discussed (Section				
		IX, "Introduce sales practices for California insurance agents" from the California Department of Insurance Eight-Hour Annuity				
		Training Outline).				
	3	Explain how this course contributes to an agent's understanding of the laws governing the design of annuities and the sale of annuity products to seniors in California.				

	4	Describe where in the course there are tools provided sales practice are out of compliance with the law.	bribe where in the course there are tools provided to assist an agent to identify when an annuity product and/or an annuity as practice are out of compliance with the law.			
E.	Indepen 1	Describe how this course contributes to an independent	h separate sheet with responses to each of the four statements listed below): nt/public insurance adjuster's understanding of insurance coverage insurance claims, and how adjuster competence may be improved by			
	2	Describe how this course contributes to an independent/public insurance adjuster's understanding of insurance statutes and rules, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of the course.				
	3					
	4	Describe how this course contributes to an independen	nt/public insurance adjuster's understanding of valuation, how the d how adjuster competence may be improved by completion of this			
F.	Life Set 1	ttlement Broker Courses: A copy of the California Department of Insurance 15-Hour Life Settlement Broker Outline with page and paragraph- references to the producer course material for every line topic				
G.	Long-T 6	Ferm Care Eight-Hour Long-Term Care Courses: A copy of the California Department of Insurance Eight-Hour Mandatory Long-Term Care Course Outline with page and paragraph-references to the provider course material for every line topic.				
Н.	Homeov 1	wners' Insurance Valuation Courses: A copy of the California Department of Insurance Homeowners' Insurance Valuation course curriculum with page and paragraph-references to the provider course material for every line topic				
valuatio	n are avail		ethics, annuities, adjusters, life settlement, long-term care and homeowners' e home page select Agents and Brokers, then select Applying to Become an			
Please send this application along with the proper attachments and filing fee to:						
	Producer P.O. Box	Department of Insurance Licensing Bureau-Education Section 957 nto, CA 95812-0957	Filing fees: \$28 per Continuing Education Course (effective June 15, 2013, \$31) \$56 per Prelicensing Education Course (effective June 15, 2013, \$62) Make check payable to: California Department of Insurance			
Courco	annlication	as must be received in this office at least 30 days prior to	the first course presentation date. Course advertisements for pending			

Course applications must be received in this office at least 30 days prior to the first course presentation date. Course advertisements for pending courses must clearly state that the course has been submitted and is pending approval, if the course application is complete and submitted within the appropriate time frame. Education Section Inquiries: (916) 492-3064.